Guide
for School Board Planning and Results Reporting

For Education Plans 2003/04 – 2005/06 (May 2003) and AERRs, November 2004

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LEARNING

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What's Changed?

• Consolidated the Provincial Goals from 5 to 3	Link 3, Page 16
• Added a new priority for improvement: Improving programs, results and reporting for First Nations, Metis and Inuit learners	Link 4, Page 17
• Added a highlights section to the AERR; this section must include the results on the required provincial measures	Page 11
• Broadened the focus of the Financial Summary from spending to encompass financial health, and dropped the requirement for reporting per student spending	Page 12
• Added a checklist of planning and reporting requirements for reference	Link 1, Pages 13-14

Clarified:

• the emphasis of the children's services priority on access to services	Link 4, Page 17
• the budget and school facilities sections	Page 8
• that strategies should address the educational needs of all students, and jurisdictions should identify strategies that meet the needs of students with special needs and circumstances where numbers warrant	Pages 8 and 9
• that summary AERR information provided to the public must include results on the required provincial measures	Page 10
• AISI reporting on results, including results of evaluations of the projects reaching the end of their three-year term.	Page 11

I. Introduction

This guide has been developed to assist Alberta's school jurisdictions (public and separate boards and francophone authorities) and their schools in preparing, updating and reporting on their three-year education plans.

Purpose of School Board Planning and Results Reporting

Preparing plans and reporting results are essential elements of accountability and of continuous improvement in basic education. These documents assist boards in:

- improving education for ECS-12 students
- identifying student learning priorities
- guiding decision making and budgeting
- addressing provincial directions and local needs, and
- enhancing communication with parents and the public.

Purpose of the Guide

This guide outlines the specific requirements for school board three-year education plans for 2003/04 to 2005/06 (due May 31, 2003) and annual education results reports on the 2003/04 school year (due November 30, 2004).

In this guide general information on planning and reporting is separated from specific requirements for school jurisdiction and school plans for 2003/04 to 2005/06 and Annual Education Results Reports. The general information is provided in Sections I to IV. Specific provincial requirements are provided in the links in Section V. These are reviewed each year. A new link (Link 1) has been added that lists all requirements for school board and school education plans and results reports. Related reference materials are in the Appendices, Section VI.

Checklist of Requirements, Link 1

While the guide is intended for school jurisdictions and schools in Alberta, it can be used by any organization that seeks to plan its goals, measure its progress, make improvements and communicate its achievements, as it is based on good planning and reporting principles.

II. Planning and Reporting Overview

Planning and reporting by school jurisdictions and schools throughout Alberta are carried out within the provincial government's Accountability Framework.

Accountability Framework

The Government's Accountability framework is an ongoing cycle that enables continuous improvement and critical reflection by:

- setting priorities, measuring progress and using results to develop actions to improve education for students;
- aligning jurisdiction and provincial goals and priorities;
- incorporating community input;
- allocating resources to achieve goals and improve results; and
- communicating with stakeholders (staff, students, parents, school councils, the public and Alberta Learning) about school jurisdiction and school directions and results.

Accountability Cycle for Continuous Improvement in ECS-12 Education in Alberta

- School Board 3-Year Plans
- Annual Budget
- Allocations to Programs and Schools
Implementation
- Annual Results Reporting
- Audited Financial Statement
Local Priorities for Improvement
- 3-Year Plan for Learning System
- Provincial Directions for Planning and Reporting
- Funding Announcement
Government Directions
Provincial Priorities for Improvement
- Provincial Annual Results Reporting
- Public Accounts

Each level in the Accountability Framework plays a key role.

Government of Alberta – sets overall provincial direction and allocates funds to ministries; monitors and reports on progress, and uses results to plan improvements.

Alberta Learning – prepares three-year learning system business plan and guidelines for school authority and post-secondary institution planning and reporting based on provincial direction; assesses and reports annually on results and uses results to plan improvements; identifies provincial priorities for improvement; allocates funds to school boards and post-secondary institutions; defines basic education; reviews school board and post-secondary plans and results for compliance with provincial requirements to identify implications for provincial level planning.

School Jurisdictions – plan and implement three-year education plans aligned with Ministry direction; allocate resources to schools and programs; monitor progress; assess and report results annually to stakeholders and use results to plan improvements.

Schools – plan and implement three-year education plans aligned with school board direction, monitor progress, assess and report results annually to stakeholders and use results to plan improvements.

References:

- Legislative Authority, Appendix 1
- Definition of Basic Education, Appendix 2
- Alberta Learning's Three-Year Business Plan for 2003/04 to 2005/06
  http://www.learning.gov.ab.ca/department/businessplan/

III. Education Planning

School jurisdiction and school plans focus on student learning over a three-year time horizon. Plans are updated annually so that as one year is completed and another is added, the plan continues to roll forward, maintaining a three-year timeframe. This allows the organization to respond to recent performance results and changes in the operating environment while maintaining continuity from year to year.

Although entirely new plans are rarely prepared, school jurisdictions and schools update some components of their plan on an annual basis, such as strategies and priorities. Every few years, other components such as the vision, mission and beliefs should be revisited and refreshed, e.g., at the beginning of a board's mandate.

Preparing and Updating Plans

School jurisdictions and schools annually update their three-year education plans based on the principle of continuous improvement, focusing on improving student learning. This annual updating takes into account a number of considerations, including:

- jurisdiction and school results;
- input from stakeholders such as school councils, students, parents and the public;
- resources available;
- Alberta Learning three-year plan and annual results; and
- feedback from Alberta Learning.

School jurisdiction and school three-year plans build on Alberta Learning's vision, mission and goals for the learning system. School jurisdictions and schools adapt goals and outcomes **required** by the province and incorporate local goals and outcomes to reflect their unique characteristics and circumstances.

Communication

School jurisdiction and school three-year education plans serve as a valuable tool for communicating with school and jurisdiction staff, students, school councils, parents and community groups. School jurisdictions and schools have an obligation and use a variety of means to inform parents and public of their goals, plans, results and priorities for improving education for students, and for the use of facilities and resources.

Publication and notification requirements for school jurisdictions plans, Link 2

Alberta Learning staff review school jurisdiction plans and annual results reports to ensure alignment with provincial goals and priorities for improvement, and to provide input into provincial-level planning for the learning system. Reports highlighting the findings from the review and analysis are prepared for use by ministry staff and provided to jurisdictions on the Extranet.

Elements of Education Plans

Each school jurisdiction's and school's three-year education plan is built on a three-year timeframe. Listed below are the elements that characterize a good plan. Some of these elements are **required** by Alberta Learning as noted.

Foundation statements, such as vision, mission, principles, and/or beliefs articulate the jurisdiction's purpose. Contextual information, such as a jurisdiction profile, trends and issues that affect operations, describe the planning environment. Alberta Learning **requires** education plans to include provincial goals and related outcomes, provincial priorities for improvement, provincial and local performance measures for outcomes and priorities for improvement, local targets for provincial performance measures, and strategies for outcomes and priorities for improvement. As well, education plans are **required** to include highlights of the jurisdiction's planned facilities projects and financial plan (Budget Report), as these other plans support the achievement of the education plan.

These elements of education planning, taken together, combine to form an education plan that enables the jurisdiction and stakeholders to know where the school jurisdiction or school is going, how it plans to get there, how it will measure progress and what resources it will use along the way.

Foundation Statements

These elements of a plan reflect the jurisdiction's aims and values.

Vision

A vision looks to the future. It describes a set of ideal circumstances and results that school boards strive to achieve. These ideals focus on student achievements and the programs or services that maximize student learning. A jurisdiction vision should be consistent with Alberta Learning's vision for the provincial learning system:

> The best learning system in the world.

Mission

A mission statement is a clear, concise description of the school jurisdiction's overall purpose and role. It gives direction to the programs and services that the jurisdiction provides for its students. A school jurisdiction's mission should be consistent with Alberta Learning's mission:

> Alberta Learning, through its leadership and work with stakeholders, ensures that learners are prepared for lifelong learning, work and citizenship so they are able to contribute to a democratic, knowledge-based and prosperous society.

Principles and/or Beliefs

Alberta Learning has established the following principles for the learning system: learner-centered, accessible, collaborative, accountable, responsive, innovative and equitable. These would be reflected in the school jurisdiction 's statements as well as their own organizational beliefs. The jurisdiction's principles or belief statements guide decision-making and provide a foundation for developing its mission, vision and goals.

Contextual Information

This information describes the organization's context and operating environment.

Profile

A profile is a brief description of the school jurisdiction or school that gives context for the plan. Profiles describe characteristics of communities, students, programs and location.

Trends and Issues

Trends and issues help school jurisdictions and schools identify opportunities and challenges that may impact planning, budgeting, providing programs and achieving results. A trend shows a direction of data over time, e.g. enrolment growth. An issue is a condition that may affect the organization's ability to fulfill its mandate or to achieve its goals.

Goals, Outcomes, Priorities, Measures and Strategies

These elements of the education plan are required, and are aligned with provincial goals, priorities for improvement, outcomes, measures and targets, as well as address jurisdiction and school aims, priorities and circumstances.

Goals [required]

Goals are broad statements that look towards the long term and steer organizations in the direction of realizing their vision. Goals are typically expressed as desired conditions or aims. School jurisdiction and school goals reflect the **required** Alberta Learning's goals that guide the direction of the learning system overall as well as address local needs and circumstances.

Outcomes [required]

Outcomes are measurable statements of what school jurisdictions and schools seek to achieve. In broad terms, they answer the question: "What will this look like when we get to where we want to be?" Plans include the **required** provincial outcomes and local outcomes for provincial and local goals. Each goal **requires** at least one outcome.

Required Goals, Outcomes, Measures and Targets for School Jurisdiction Plans, Link 3

Priority Areas for Improvement [required]

Priority areas for improvement reflect local and province-wide priorities that require immediate, concerted attention. Reviewing annual performance results is an important basis for selecting priorities in areas where results do not meet expectations. Selecting and addressing priorities for improvement are essential aspects of the accountability cycle for continuous improvement in Alberta's basic learning system. Jurisdiction plans are **required** to include strategies and measures for provincial and local priorities for improvement. To assist jurisdictions, Alberta Learning is working to improve information on aboriginal student achievement.

Required Provincial Priorities for Improvement, Link 4

The provincial measures for the provincial priorities for improvement are included in Appendix 3 for reference. The required measures are labeled.

Reference

Provincial Measures and Results for Priority Areas for Improvement, Appendix 3

Performance Measures and Targets [required]

Performance measures are the assessment tools that school jurisdictions and schools use to track how far along they are in achieving the outcomes in their plan. Education plans include at least one measure for each outcome; conversely, one measure can address more than one outcome. Measures are quantitative and are expressed as "numbers of" (in relation to a total) or "percentages of".

School jurisdictions and schools list in their plans the measures they will use to assess and report their results, as well as past results for these measures, if available. These measures include the **required** provincial measures: provincial achievement tests, diploma exams and the high school completion rate, and locally-determined measures for provincial and board outcomes and priorities for improvement.

Targets are strategic tools to help school jurisdictions and schools focus on maintaining or improving results. Targets show desired levels of performance to be attained by a certain time. Locally developed targets are **required** for student results on provincial achievement tests for each year of the plan and for the five-year high school completion rate for 2003/04. Targets are encouraged for local measures.

Required Performance Measures and Targets, Link 5

References

Performance Measurement, Appendix 4

Setting Local Targets for Student Achievement, Appendix 5

Conducting Surveys, Appendix 6

Strategies [requirement]

Strategies are actions that school jurisdictions and schools take to achieve goals and desired outcomes that meet the needs of all their students. School jurisdictions are **required** to develop strategies for each goal to achieve outcomes and to address provincial and local priorities for improvement. The strategies also reflect the implementation of programs and initiatives, such as: Alberta Initiative for School Improvement (AISI), technology plans (including ICT) Student Health, First Nations, Metis and Inuit (FNMI) education, Early Literacy, English as a Second Language and programs and services for students with special needs. In addition, strategies address local circumstances, issues, trends and opportunities.

Highlights of School Facilities Plans [required]

In the school facilities highlights section of the three-year education plan, school boards highlight for parents and the public the major school renewal and construction projects underway and planned for their jurisdiction for the next three years. These highlights **must**:

- include the educational purpose of the projects and benefits to students (e.g. building an addition or new school to accommodate enrolment growth, upgrading a lab to improve CTS programs)
- reflect the jurisdiction's BQRP priorities and the three-year capital plan approved by Infrastructure (or submitted if approval is pending)
- contain information about where readers can obtain more information about the jurisdiction's facility renewal priorities and three-year capital plan.

Budget Highlights [required]

This section presents highlights from the board's budget for the first year of the three-year plan in a way that is easily understood by and meaningful to the public. This section may refer to budgeted changes in enrolment, certificated and uncertificated staff, programs, funding, revenues and expenses, annual surpluses/deficits and accumulated surpluses, focusing on anticipated material changes from the current year. The highlights can provide contextual information such as the guiding principles the board uses in financial planning.

Budget Highlights **must:**

- provide the public with key financial information about the upcoming school year
- clearly present summarized information from the Budget Report in charts or tables for the primary audience – parents and other members of the community
- indicate where and how readers can obtain detailed information about the board's budget

School Planning [required]

School education plans are a tool to help school jurisdictions and schools make continuous improvement, focusing on student learning and results. And, because school plans also address provincial goals and board direction, they help ensure the entire basic learning system is focused on key improvements and the educational needs of Alberta students.

School plans are based on a three-year cycle and updated annually to incorporate school board direction and local input, and to address areas for improvement identified from results. Plans indicate how progress will be measured and enable critical reflection and continuous improvement. As well, schools use their plans to communicate with the larger community.

School plans reflect provincial and board direction, local needs and the advice of school councils, parents, students and the larger community. School plans contain the **required** learning system goals, measures and targets as well as goals, outcomes, measures, targets and strategies schools develop to address priorities and the educational needs of their students. If a substantial portion of students have special needs or circumstances, the school plan must include strategies to address these needs.

Required Goals, Measures and Targets for School Plans, Link 6

IV. Results Reporting

School jurisdictions and schools assess and report annually on their progress and achievements and use the results information to identify improvements to address in the next update of their plan. Every few years jurisdictions may wish to undertake a major retrospective by assessing accomplishments over a longer span of time, e.g., at the end of a board's mandate, in preparation for a major direction-setting exercise of the next board.

School Board Reporting

Each year school jurisdictions report on the progress of their three-year education plans in their Annual Education Results Report (AERR). The performance measure results are the primary source of information that school boards use to inform their planning and improve programs for students. Measures provide information on areas where performance is strong and identify areas that need improvement. In short, the measures information allows school jurisdictions to practice results-based decision-making.

The annual results report informs stakeholders where the school jurisdiction is in relation to where it wants to be. It demonstrates that the school jurisdiction is accountable for student achievement and for the wise use of resources to provide quality programs for students and to address improvement priorities.

Communication [Requirement]

AERRs provide school jurisdictions and schools the opportunity to summarize their accomplishments in addition to reporting on performance measures.

AERRs are public documents. School jurisdictions and schools are **required** to communicate results to the larger community. A variety of methods is available, including newspaper inserts, brochures, websites, jurisdiction report card, community meetings, etc. These summaries of the jurisdiction AERR **must** include highlights of results on the required performance measures.

Publication and Notification Requirements, Link 1

Alberta Learning staff review school jurisdiction AERRs to ensure alignment with provincial goals and to provide input into provincial-level planning for the learning system. Reports highlighting the findings from the review and analysis are prepared for use by ministry staff and provided to school jurisdictions on the Extranet.

Elements of Annual Education Results Reports

The Annual Education Results Report (AERR) provides information on the jurisdiction's and school's major activities and achievements of the past year, with a focus on results for students. Listed below are the elements that characterize a results report. Those elements required by Alberta Learning are labeled.

Highlights [New Requirement]

This section briefly highlights the jurisdiction results and accomplishments for the last year and must highlight the results of the **required** provincial measures.

Summary of Accomplishments

This information highlights the jurisdiction's progress and accomplishments in implementing the three-year education plan, including programs and initiatives such as AISI, Student Health, First Nations, Metis and Inuit (FNMI) education, Early Literacy, English as a Second Language, information and communications technology as well as programs and services for children with special needs.

Note: School jurisdictions are **required** to report AISI project summaries in the AERR, focusing on results achieved. For projects that have reached the end of their three-year term, this information must include highlights of the results of the summative evaluation. (See *AISI Administrative Handbook*, pages 15, 26, 28 and 31.) This information could be included in the Summary of Accomplishments or in the section that reports Performance Measure Results (below).

Performance Measures Results [required]

School jurisdictions provide results information for the performance measures in the three-year plan for the **required:**

- provincial measures and priorities for improvement
- local measures and priorities for improvement

and assess their progress.

School jurisdictions analyze results to assess and report on progress. Contextual information can be provided to explain results and describe the environment in which results were achieved. This qualitative information enhances understanding of quantitative results and contributes to the overall assessment of progress and achievement.

Requirements for Performance Measures, Link 7

Provincial results on measures related to the provincial priorities for improvement are provided in Appendix 3. If jurisdictions use corresponding local measures, they can compare their performance with the provincial results. The **required** measures are labeled.

Provincial Results for Priorities for Improvement, Appendix 3

Future Challenges [required]

School jurisdictions briefly describe the major education issues and priorities for the next few years, including priorities for improvement identified from the assessment of results. This section also discusses emerging issues and trends that have implications for the school jurisdiction.

Highlights of Facilities Projects [required]

School jurisdictions highlight for parents and the public their progress on major facility projects (building renewal and construction funded by Infrastructure) for the previous school year, focusing on the benefits to students.

Financial Summary [required]

In the financial summary, boards communicate to the public the key messages arising from their audited financial statements that reflect their financial health. This information is evaluative of the year's financial results, and includes such information as significant changes over the prior year, the annual operating surplus/deficit, accumulated operating surplus, and capital reserves.

This section **must:**

- provide the reader with key financial information about the previous school year, including the jurisdiction's financial position,
- include information in table or graph format for the primary audience – parents and other members of the community,
- indicate where and how readers can access the board's audited financial statements.

School Reporting [required]

Schools report annually to parents and their communities on student achievement and use of resources. The reports include the results information on all performance measures in the school's plan, including **required** provincial student achievement measures. School reports also include specific elements required by the board.

Reporting Requirements for Schools, Link 8

V. Links

The links list specific requirements for school and school jurisdiction three-year education plans and Annual Education Results Reports (AERRs).

Link 1
Checklist of Requirements of School Board Education Plans and Annual Education Results Reports

School Board Education Plans

Goals and Outcomes (page 6, Link 3)
Reflect the three provincial goals:

- Goal 1: High Quality Learning Opportunities for All
- Goal 2: Excellence in Learner Outcomes
- Goal 3: Highly Responsive and Responsible Jurisdiction
- and related outcomes for each goal

Priority Areas for Improvement (page 7, Link 4)
Include the Provincial Priorities for Improvement:

- Improving early literacy and numeracy
- Improving children's access to services through co-ordination of services (clarified).
- Improving learning through effective use of information of communication technology.
- Improving programs, results and reporting for First Nations, Metis and Inuit learners (new).
- Improving secondary student achievement in mathematics.
- Increasing high school completion rates.
- Improving community satisfaction with education.
- Local priorities for improvement.
- Develop strategies and measures for each provincial and local priority.

Performance Measures and Targets (page 7, Link 5)

- Percentages of students who achieved the acceptable standard and the percentages who achieved the standard of excellence on provincial achievement tests, based both on those writing and all students in grade, including targets for each year of the plan
- Percentages of students who achieved the acceptable standard and the standard of excellence on diploma exams
- Student participation in diploma exam courses
- Percentage of students who completed high school within three and five years of entering grade 10, including a target for 2003/04 for the five-year completion rate
- Measures for provincial and local priorities

Strategies (page 8)
Include strategies that meet the needs of all students, including:

- Strategies for each outcome
- Strategies for priority areas for improvement and initiatives

Other

- Highlights of School Facilities Plans (page 8)
- Budget Highlights (page 8)

School Board Annual Education Results Report (pages 11-12)

- Highlights of results, including results on the required measures (Link 6)
- Summary of AISI project results (page 11)

Reporting and Analysis of Performance Measures (page 11, Link 7).

- Report percentages of students writing provincial achievement tests who achieved the acceptable standard (five years of results) in relation to provincial results and targets and jurisdiction targets for 2003/04.
- Report percentages of students writing provincial achievement tests who achieved the standard of excellence in relation to jurisdiction and provincial results and targets for 2003/04.
- Report percentages of all students in grades 3, 6 and 9 (five years of results) who achieved the acceptable standard in relation to jurisdiction targets for 2003/04 and to provincial results and targets.
- Report percentages of all students in grades 3, 6 and 9 (five years of results) who achieved the standard of excellence in relation to jurisdiction targets for 2003/04 and to provincial results and targets.
- Report the percentages of students achieving the acceptable standard and the standard of excellence on diploma examination in relation to provincial results.
- Report participation rate in diploma exam courses in relation to the provincial participation rate.
- Report the percentages of students who completed high school within three and five years of entering grade 10 in relation to jurisdiction target for 2003/04 and to provincial results and target.
- Report on all measures included in the jurisdiction plan for 2003/04 to 2005/06, and
- Assess and comment on progress on measures for all provincial and local outcomes and priorities for improvement.

Other

- Future Challenges (page 12)
- Highlights of Facilities Projects (page 12)
- Financial Summary, including a brief overview of jurisdiction financial position (page 12)

School Plans (pages 9)

- The three learning system goals (Link 6)
- Required measures: provincial achievement tests, including targets for each year of the plan, and diploma examinations
- Measures for local outcomes and priorities
- Any other information required by the board.

School Reports (page 12)

- Report student results on provincial achievement tests and diploma examinations in relation to school targets and provincial results and targets (see Link 8 for specific requirements)
- Report results on diploma examinations in relation to provincial results
- Report results on local measures
- Any other information required by the board.

Link 2
Publication and Notification Requirements

Three-year education plans and AERRs are **required** to be made available to the public. Jurisdictions are encouraged to use a variety of methods to communicate their plans and their achievements to the broader community.

Education Plans

Three-year plans are **required** to be updated by **May 31** of each year and posted on the jurisdiction's website. School jurisdictions notify Alberta Learning of the website posting at field.services@learning.gov.ab.ca. Alternatively, jurisdictions provide a copy of their plan as an e-mail attachment to the appropriate Field Services zone director.

Results Reports

The jurisdiction's AERR is **required** to be prepared and posted on its website by **November 30** of each year. Summary information provided to the public must include the results on **required** performance measures in relation to provincial results and/or standards and provincial and jurisdiction targets. School jurisdictions notify Alberta Learning of the website posting at field.services@learning.gov.ab.ca. Alternatively, jurisdictions provide a copy of their AERR as an e-mail attachment to the appropriate Field Services zone director.

Link 3 Required Goals, Outcomes and Measures for School Jurisdiction Plans 2003/04 to 2005/06

Listed below are the learning system goals, outcomes and performance measures that are **required** to be incorporated in school authority three-year plans. In response to stakeholder feedback, Alberta Learning's business plan goals have been consolidated from five to three goals as indicated in the table below. The intent of the learning system outcomes have not changed, although some have been clarified.

The learning system outcomes, which apply across the entire learning system may be interpreted or adapted by school jurisdictions to reflect their ECS-12 mandate, student needs and local circumstances. These goals and outcomes are reviewed annually in the Ministry's business planning process, which includes consultation with stakeholders. Jurisdictions are **required** to develop and implement strategies for these outcomes.

Goal 1: High Quality Learning Opportunities for All*	
Outcomes	**Measures and Local Targets**
• The learning system meets the needs of all learners, society, and the economy	• Local measure required and target encouraged
• All Albertans can participate in quality learning.	• Local measure required and target encouraged
• The learning system is affordable.	• Local measure required and target encouraged
• Financial need is not a barrier to learners participating in learning opportunities	• Local measure required and target encouraged
Goal 2: Excellence in Learner Outcomes	
Outcomes	**Measures and Local Targets**
• Learners demonstrate high standards.	• Provincial Achievement Tests: percentages of students achieving the acceptable standard and percentages achieving the standard of excellence, both for those writing and the cohort. • Local targets required for each test for each year of the plan. • Diploma exams: Percentages of students who achieve the acceptable standard, percentages who achieve the standard of excellence, and participation in diploma exam courses.
• Learners complete programs.	• High school completion rate: Percentages of students completing high school within three and five years of entering grade 10. • Local target required for 2003/04 for the five-year rate.
• Learners are well prepared for lifelong learning.	• Local measure required and target encouraged
• Learners are well prepared for employment.	• Local measure required and target encouraged
• Learners are well prepared for citizenship.	• Local measure required and target encouraged
Goal 3: Highly Responsive and Responsible Jurisdiction	
Outcomes	**Measures and Local Targets**
• Improved results through effective working relationships with partners and stakeholders.	• Local measure required and target encouraged
• The jurisdiction demonstrates leadership and continuous improvement.	• Local measure required and target encouraged

* School jurisdictions may choose to include in this goal an outcome and corresponding measure(s) and strategy(ies) relating to high quality teaching.

Link 4
Provincial Priorities for Improvement for School Jurisdiction Plans, 2003/04 – 2005/06

Priorities for improvement are important outcomes where performance does not meet expectations. Jurisdictions are **required** to develop and include strategies and measures in their three-year plans to address provincial and local priorities for improvement based on their results, and to report results related to the priorities in their Annual Education Results Reports (AERRs).

Listed below are the **required** provincial priorities for improvement for the basic education and their relationship to goals. A priority area for First Nations, Metis and Inuit learners has been added. The children's services priority's focus on improving access has been clarified. The other priorities continue from previous years. The priorities are presented in an order generally reflecting progression through school. See Appendix 3 for provincial results for the **required** measures for the early literacy and numeracy, the secondary mathematics and high school completion priorities.

- **Improving early literacy and numeracy**: related to Goals 1 and 2
- **Improving children's access to services through co-ordination of services (clarified)**: related to Goal 1 and Goal 3
- **Improving learning through effective use of information and communication technology**: related to Goals 1 and 2
- **Improving programs, results and reporting for First Nations, Metis and Inuit learners (new)**: related to Goals 1 and 2
- **Improving secondary student achievement in mathematics**: related to Goals 1 and 2
- **Increasing high school completion rates**: related to Goals 1 and 2
- **Improving community satisfaction with education**: related to all goals

Link 5

Required Performance Measures and Targets for School Jurisdiction Plans, 2003/04 to 2005/06

The specific student achievement performance measures and targets listed below are **required** to be included in school jurisdiction three-year plans along with results for the past five years, if available.

Required measures for the outcome: Learners demonstrate high standards in Goal 2 – Excellence in Learner Outcomes.

1. Percentages of students (excluding those in home education programs) who achieved the acceptable standard and percentages who achieved the standard of excellence on provincial achievement tests in Grades 3, 6 and 9 (five years of results), based both on those writing and the cohort (total enrolment in grade) in relation to provincial results and provincial targets. (Provincial targets for 2003/04, 2004/05 and 2005/06 are included in Alberta Learning's business plan for 2003/04 – 2005/06, available online at http://www.learning.gov.ab.ca/department/businessplan/

   Set targets for each year of the plan, (i.e., targets for 2003/04, 2004/05 and 2005/06).

2. Percentages of students who achieved the acceptable standard and percentages who achieved the standard of excellence on diploma examinations (five years of results) in relation to provincial results.

3. Student participation in diploma exam courses in relation to the provincial participation rate.

   Note: For the measures listed above, Alberta Learning provides school jurisdictions with multi-year reports on student results and participation. Jurisdictions include this information in their plans and use it for setting targets and for developing strategies to improve student programs and results.

Required measure for the outcome: Learners complete programs in Goal 2 – Excellence in Learner Outcomes.

4. Percentages of students who completed high school within three and five years of entering grade 10, including (five years of results) in relation to provincial results and targets for the five-year rate.

   Set a target for 2003/04 for the five-year completion rate. **(new)**

   Note: Alberta Learning provides multi-year reports to school jurisdictions on the Extranet annually on their high school completion rates and the comparable provincial rates. Jurisdictions include this information in their plans and use it for setting targets and for developing strategies to enable more students to complete high school.

Link 6
Required Goals, Measures and Targets for School Plans, 2003/04-2005/06

School plans are **required** to include the three provincial goals (listed below) for Alberta's learning system. These provincial goals can be restated, and contextualized, by the school to reflect the school's focus in the ECS-12 system. School plans also include local goals and outcomes specified by the board and/or developed by the schools, as well as strategies and measures for all outcomes and priorities.

Provincial Goals:

Goal 1 High Quality Learning Opportunities for All (no change)

Goal 2 Excellence in Learner Outcomes (formerly Goals 2 and 3)

Goal 3 Highly Responsive and Responsible School (formerly Goals 4 and 5)

For Goal 2 above, the following performance measure is **required**.

- Student results for provincial achievement tests and diploma examinations. Include targets for each year of the plan for provincial achievement tests.

Specifically:

- Percentages of students writing grades 3, 6 and 9 provincial achievement tests who achieved the acceptable standard and percentages who achieved the standard of excellence (five years of results) in relation to school targets, provincial results and provincial targets. (Provincial targets for 2003/04, 2004/05 and 2005/06 are included in Alberta Learning's business plan for 2003/04 – 2005/06, available online at http://www.learning.gov.ab.ca/department/businessplan/)

- Percentages of students in grades 3, 6 and 9 writing provincial achievement tests.

- Percentages of students writing grade 12 diploma examinations who achieved the acceptable standard and the percentages who achieved the standard of excellence (five years of results) in relation to provincial results.

- Student participation in diploma examination courses in relation to the provincial participation rate.

Note: Alberta Learning provides multi-year reports for schools on student achievement and participation on provincial achievement tests and diploma examinations that schools include in their three-year plans and use to set targets and improve programs for students.

Link 7
Required School Jurisdiction Performance Measures for November 2004 AERR

Listed below are the performance measures **required** to be reported in the jurisdiction Annual Education Results Report. They provide information related to the outcomes "students achieve high standards" and "students complete programs" for the goal Excellence in Learner Outcomes in the jurisdiction's three-year plan. In addition, jurisdictions **must** report on all measures and targets in their plan.

1. Percentages of students (excluding those in home education programs) who achieved the acceptable standard and percentages of students who achieved the standard of excellence on provincial achievement tests in grades 3, 6 and 9 (five years of results) based both on those writing and the cohort (total enrolment in grade) in relation to provincial results and jurisdiction and provincial targets for 2003/04. (Provincial targets for 2003/04 are included in Alberta Learning's business plan, available online at http://www.learning.gov.ab.ca/department/businessplan/)

2. Percentages of students who achieved the acceptable standard and percentages who achieved the standard of excellence on diploma examinations (five years of results) in relation to provincial results.

3. Student participation in diploma examination courses in relation to the provincial participation rate.

   Note: For the above measures, the Alberta Learning provides multi-year reports by school and school jurisdiction on student achievement and participation on provincial achievement tests and diploma examinations. These reports contain the information to report to the public on the above measures.

4. Percentages of students who complete high school within three and five years of entering grade 10, (five years of results, including projections) in relation to jurisdiction targets and provincial results and targets for 2003/04 for the five-year rate.

   Note: Alberta Learning provides multi-year reports on the Extranet to jurisdictions on their high school completion rates and comparable provincial rates. These reports contain the information to report to the public in the above measures.

See the 2002 edition of the *Guide for School Board Planning and Results Reporting* for jurisdiction reporting requirements for November 2003 AERR.

Link 8
Required School Performance Measures for Reporting in 2004

School reports must include the **required** provincial measure - student results on provincial achievement tests and diploma examinations - for the learning system goal: Excellence in Learner Achievement, as follows:

- Percentages of students writing provincial achievement tests in grades 3, 6 and 9 who achieved the acceptable standard and the percentages who achieved the standard of excellence (five years of results) in relation to provincial results, and school and provincial targets for 2003/04. (Provincial targets for 2003/04 are included in Alberta Learning's business plan, available online at http://www.learning.gov.ab.ca/department/businessplan/)

- Percentages of students in grades 3, 6 and 9 writing provincial achievement tests.

- Percentages of students writing grade 12 diploma examinations who achieved the acceptable standard and the percentages who achieved the standard of excellence (five years of results) in relation to provincial results.

- Student participation in diploma examination courses in relation to the provincial participation rate.

Alberta Learning provides multi-year reports by school and school jurisdiction on student achievement and participation for provincial achievement tests and diploma examinations. These reports contain the information to report to the public on the above measures.

In addition, schools report on all measures and targets in their plans and include any other information required by their board.

See the 2002 edition of the *Guide for School Board Planning and Results Reporting* for the school reporting requirements for the school's reports in 2003.

VI. Appendix 1
Legislative Authority

The provincial government has developed a comprehensive concept of accountability which expanded the focus from accounting for dollars spent to include accounting for results achieved. Accountability for performance involves developing plans to make best use of resources available, assessing results to determine if expectations are being met, identifying where improvement is needed, and reporting the results to the public.

This expanded concept of accountability, applying to government departments and funded agencies and organizations, was established in legislation in 1995. The *Government Accountability Act* (GAA) requires government departments and school boards as well as other public agencies to prepare plans and report on results.

The accountability cycle for the basic learning system (*Accountability in Education – Policy Framework*, June 1995) was developed to describe the application of government's comprehensive concept of accountability to the ECS-12 system. This cycle focuses on continuous improvement and on the linkage of school authority plans and reports to each other and to provincial directions for the learning system, as reflected in the School Authority Accountability Policy, 2.1.1 (*Policy, Regulations and Forms Manual*, on-line at http://www.learning.gov.ab.ca/educationguide/pol-plan/polregs/toc.asp).

A variety of documents essential for school system operations are available on the department's website, such as the three-year business plan for the learning system, the Guide to Education, the Program of Studies, the Standards for Special Education and the Funding Manual. The *Government Accountability Act* and the *School Act* are available on the Queen's Printer website linked from the on-line Policy Manual Table of Contents, or at http://www.gov.ab.ca/qp/index.html.

Alberta Learning's website also provides information to enhance authority planning and reporting, such as the provincial surveys of parents, high school students and the public and the summaries of the reviews of school jurisdiction plans and AERRs are provided in the Extranet.

Appendix 2
Basic Education in Alberta – The Definition

(Ministerial Order No. 004/98)

A basic education must provide students with a solid core program including language arts, mathematics, science and social studies. Students will be able to meet the provincial graduation requirements and be prepared for entry into the workplace or post-secondary studies. Students will understand personal and community values and the rights and responsibilities of citizenship. Students will develop the capacity to pursue learning throughout their lives. Students also should have opportunities to learn languages other than English and to attain levels of proficiency and cultural awareness which will help to prepare them for participation in the global economy.

Student Learning Outcomes

Students are expected to develop the knowledge, skills and attitudes that will prepare them for life after high school. A basic education will allow students to:

- Read for information, understanding and enjoyment.
- Write and speak clearly, accurately and appropriately for the context.
- Use mathematics to solve problems in business, science and daily-life situations.
- Understand the physical world, ecology and the diversity of life.
- Understand the scientific method, the nature of science and technology, and their application to daily life.
- Know the history and geography of Canada and have a general understanding of world history and geography.
- Understand Canada's political, social, and economic systems within a global context.
- Respect the cultural diversity and common values of Canada.
- Demonstrate desirable personal characteristics such as respect, responsibility, fairness, honesty, caring, loyalty, and commitment to democratic ideals.
- Recognize the importance of personal well-being and appreciate how family and others contribute to that well-being.
- Know the basic requirements of an active, healthful lifestyle.
- Understand and appreciate literature, the arts and the creative process.
- Research an issue thoroughly and evaluate the credibility and reliability of information sources.
- Demonstrate critical and creative thinking skills in problem solving and decision making.
- Demonstrate competence in using information technologies.
- Know how to learn and work independently and as part of a team.
- Manage time and other resources needed to complete a task.
- Demonstrate initiative, leadership, flexibility, and persistence.
- Evaluate their own endeavours and continually strive to improve.
- Have the desire and realize the need for life-long learning.

Standards for Student Learning

The Minister of Education defines acceptable standards and standards of excellence for student achievement in consultation with Albertans. Employers are involved in specifying the knowledge, skills and attitudes needed in the workplace. Schools, school authorities and the Minister of Education assess and report regularly to the public on a range of student learning.

The school's primary responsibility is to ensure that students meet or exceed the provincial standards as reflected in the Student Learning Outcomes (outlined above), the Alberta Programs of Study, provincial achievement tests, diploma examinations and graduation requirements.

Education Delivery

Schools must engage students in a variety of activities that enable them to acquire the expected learnings. Schools have authority to deploy resources and may use any instructional technique acceptable to the community as long as the standards are achieved. Schools, teachers and students are encouraged to take advantage of various delivery options including the use of technology, distance learning and the workplace.

Schools play a supportive role to families and the community in helping students develop desirable personal characteristics and the ability to make ethical decisions. Schools also help students take increasing responsibility for their learning and behaviour, develop a-sense of community belonging and acquire a clearer understanding of community values and how these relate to personal values.

Students learn basic, transferable knowledge, skills and attitudes in school. Schools, in co-operation with employers, provide opportunities for students to develop and practice employability skills. The Minister of Education provides credit for off-campus learning that is approved and accepted by the school and the employer. Government works with schools, employers and post-secondary institutions to help young people make a smooth transition to work and further study.

Appendix 3
Provincial Results for Measures for the Provincial Priority Areas for Improvement

Listed below are the results for the provincial performance measures related to the required provincial priority areas for improvement. The provincial achievement test results for grade 3 language arts and mathematics and the results for grade 9 mathematics are the **required** measures for the early literacy and numeracy and the secondary mathematics priorities respectively. The school jurisdiction high school completion rate is the **required** measure for improving high school completion. The other measures are provided as examples. School authorities identify appropriate measures for these other priorities in their three-year plans. If the school jurisdiction's measures correspond to the provincial measures, jurisdictions can also report their results in relation to provincial results in their plans and AERRs.

Priority: Improving early literacy and numeracy.

- Percentages of students who achieved the acceptable standard on the grade 3 provincial achievement tests in language arts and mathematics and the percentages who achieved the standard of excellence (**required**).

Grade 3 Language Arts	1997/98	1998/99	1999/00	2000/01	2001/02
Those who wrote					
- Acceptable	86%	89%	91%	89%	90%
- Excellence	15%	16%	19%	17%	16%
Total Enrolment in Grade					
- Acceptable	80%	84%	84%	83%	81%
- Excellence	14%	15%	18%	16%	15%

Grade 3 Mathematics	1997/98	1998/99	1999/00	2000/01	2001/02
Those who wrote					
- Acceptable	81%	85%	88%	88%	89%
- Excellence	21%	25%	28%	25%	29%
Total Enrolment in Grade					
- Acceptable	75%	80%	82%	82%	81%
- Excellence	20%	24%	26%	24%	27%

Priority: Improving coordination of services for children with special needs.

- Percentages of parents of children with severe special needs who are satisfied with services for their child.

1997/98	1998/99	1999/2000	2000/01	2001/02
79%	78%	76%	76%	81%

- Percentages of parents of children with severe special needs who agree or strongly agree with the statement: "The people providing services for my child work well together."

1997/98	1998/99	1999/2000	2000/01	2001/02
85%	85%	85%	82%	85%

Priority: Improving learning through effective use of information and communication technology.

- Percentages of students and parents who report school helps improve students' computing skills.

	1997/98	1998/99	1999/00	2000/01	2001/02
Students	64%	70%	69%	69%	62%
Parents	67%	80%	79%	79%	76%

- Percentages of students and parents who report satisfaction with student access to computers in schools.

	1998/99	1999/00	2000/01	2001/02
Students	83%	85%	86%	83%
Parents	74%	72%	73%	71%

Priority: Improving secondary student achievement in mathematics*.

- Percentages of students who achieved the acceptable standard on the Grade 9 provincial achievement test in mathematics and the percentages who achieved the standard of excellence (**required**).

Grade 9 Mathematics	1997/98	1998/99	1999/00	2000/01	2001/02
Those who wrote					
- Acceptable	72%	72%	74%	75%	74%
- Excellence	14%	15%	16%	18%	19%
Total Enrolment in Grade					
- Acceptable	64%	64%	67%	66%	65%
- Excellence	13%	14%	14%	16%	17%

* With the phase-in of Pure Mathematics 30 and Applied Mathematics 30, comparable results for grade 12 students in prior years are not available.

Priority: Increasing high school completion rates.

- Percentages of students who completed high school within three and five years of entering Grade 10 (**required**).

Grade 10 Year	Completion Rates	
	In 3 years	In 5 years
1995/96	62% (1997/98)	72% (1999/00)
1996/97	63% (1998/99)	73% (2000/01)
1997/98	65% (1999/00)	75%* (2001/02)
1998/99	65% (2000/01)	76%* (2002/03)

*Projections. These projections indicate results likely to be achieved given the three-year completion rates for these groups of grade 10 students and five year completion rates in prior years. The projection for 2002/03 also considers the projected 5-year rate for 2001/02.

Priority: Improving public satisfaction with education.

- Percentages of the public satisfied with the quality of education in schools.

1997/98	1998/99	1999/00	2000/01	2001/02
70%	66%	68%	70%	63%

Appendix 4
Performance Measurement

Performance measures in school authority and school plans and results reports provide information on achievement of outcomes on key aspects of the education system. This information is an essential part of accountability that enables the organization to:

- assess and report on progress, what's working well, what needs improvement
- determine priorities for improvement and set improvement targets
- make program and budget decisions to maintain good performance and improve performance in areas requiring improvement.

Measures typically provide quantifiable information on key aspects of education. This information is generated quantitatively through tests and data analysis or through qualitative means, such as observation, interviews, portfolio reviews. Whether quantitative or qualitative, measures demonstrate observable change. To be meaningful, measures information is obtained regularly (e.g., annually) and is normally expressed in percentages, ratios, or numbers in relation to a total.

Types of Performance Measures

- **Outcome measures:** provide information on progress toward desired results in key areas - effectiveness of programs, impacts on clients.

- **Intermediate outcome measures**: For some desired outcomes, results may not be known for several years. In such instances, it is useful to measure intermediate steps – milestones or landmarks - toward the desired outcome.

  The measures in school authority and school plans and results reports focus on outcomes and constitute the core set for assessing and reporting on progress and achievement.

  Other types of measures, listed below, are important for managing resources, providing programs and services and reporting contextual information:

- **Output measures**: information on number of clients served and types of services provided.
- **Process measures**: information on activity and efficiency. These measures indicate demand for services and cost per unit of providing service.
- **Input measures**: information on resources allocated to programs, such as funding, personnel, equipment. These measures provide information on cost of providing programs and services.

Characteristics of good performance measures

Good performance measures provide information that is:

- Understandable – clear and sufficient to provide an understanding of the organization or system to staff, community and government
- Valid – meaningful and credible (sound, defensible)
- Relevant and appropriate – timely, related to important aspects
- Reliable – unbiased, error free and verifiable
- Comparable – show change over time and/or among similar organizations
- Discrete – provides information in distinct, non-overlapping categories
- Empowering – useful for decision making, promote improvement
- Practical – can be reliably assessed with reasonable effort

References:

Alberta Treasury, *Measuring Performance: A Reference Guide*, September 1996. On the internet at http://www.treas.gov.ab.ca/publications/measuring/. Click on "Other Alberta performance measurement documents."

Alberta Auditor General, *Government Accountability*, February, 1997. On the internet at http://www.oag.ab.ca/. Click on "The Reading Room."

Appendix 5
Setting Local Targets for Student Achievement

Targets and Planning

A target is a desired level of measurable or observable performance to be attained by a specified time. Targets are an implicit part of any goal. While a school's or school authority's educational goals point out the directions for people's efforts, targets describe in specific terms what will be accomplished by a certain time. This allows staff to assess whether they are heading where they intended to go, and how well they are moving toward their desired outcomes. Assessment of progress in relation to a target may also lead to the recognition that a different target would be more helpful in guiding your school's or school authority's efforts toward a particular goal. By identifying immediate, reachable outcomes, targets encourage teachers, students, administrators, and their community to believe that distant goals are attainable.

Viewed in this way, targets can be a valuable part of your school or school authority plan. Your mission, mandate, values and beliefs, and long-range goals all provide a context for setting specific targets. Similarly, past achievement levels are helpful indicators of what specific targets may be most appropriate. This is why achievement test and diploma examination results, as well as results of various other local assessments, are relevant in target setting.

Local Focus

Quantitative targets for student achievement on the provincial achievement tests are **required** in school and school authority education plans. School jurisdiction targets provide a framework for each school in the jurisdiction to use in setting school targets. School jurisdiction targets will be most helpful if they take into account the variations in overall student achievement from school to school.

Systematic interpretation of school results from provincial achievement tests will reveal where students need more help in order to continue learning successfully. This can be the beginning point for setting school authority and school targets for student performance on the tests for the next three years.

Local targets should be realistic and achievable, based on past performance. It is possible that local targets would be different from provincial targets and standards. Staff in each school will be able to identify what percentage of their students reasonably can be expected to achieve the provincial standard in a particular test within the time specified in the targets. An important part of this decision is agreeing on how financial and human resources can support the targets.

Tips for Setting Local Targets

- Consider past and desired participation rates in achievement tests.
- Prioritize to focus on areas needing improvement. For example, emphasize subjects needing improvement in student performance are across grades. It may be reasonable to set "hold the line" targets to maintain current levels of performance in other areas temporarily while directing attention to the selected areas.
- Set targets in relation to other targets. It is important to ensure that achievement of one target does not jeopardize the achievement of another. For example, student participation rates for achievement tests should not decrease because of a desire to improve school or authority results.
- Work collaboratively across grades in a school. Students' performance on an achievement test reflects their learning over the years. Teachers in all grades can contribute important insights and assistance in setting targets.
- Use the school reports on achievement test results to identify what aspects of a subject or course need attention, and use this information to plan targets.
- Emphasize what students need, in order to succeed, rather than focusing on problems that keep students from achieving at the levels expected provincially.
- Expect to set different targets in different grades and subjects/courses, depending on past results and current priorities and resources.
- Work collaboratively at the jurisdiction level, to identify areas of common strength or areas for improvement across different schools and to determine targets for the district that can encourage all schools.
- Interpret targets to students and parents so that they are part of the school-wide effort to achieve targets.
- Report to students and parents on student achievement in relation to targets.

Targets in Perspective

Provincial tests, though providing a common standard and important information about students' learning, are only one of many measures for evaluating the effectiveness of schools and school authorities.

School authorities and individual schools may find it helpful to set targets for other indicators of student achievement, and for areas other than student achievement.

Examples include:

- completion of programs
- satisfaction reported by students or parents
- involvement of parents or others from the community in schools
- student involvement in the community or in extra curricular activities.

These other targets can either be quantitative (e.g., "by 2003, 80% of students") or qualitative (e.g., "improve…" or "maintain…").

Through its targets, each school authority or school, together with parents and members of the community, can highlight priorities that exist locally for a given year and commit to achieving certain results.

Insofar as target setting complements other strategies for improving student learning, your targets are likely to contribute to student learning and to the overall effectiveness of schooling in your community.

Appendix 6
Conducting Surveys

Some local measures may require surveys of parents, students, staff and other community members.

To be manageable, surveys can be conducted on a random sampling basis or rotated among schools or stakeholder groups over a three-year period.

If school authorities and schools use the same questions as are used in Alberta Learning's annual surveys of a stratified random sample of parents, students and the public, local results can be considered in relation to provincial results. The questions asked in the Ministry's surveys of students, parents and the public are available on the Internet at http://www.learning.gov.ab.ca/educationsystem/planning.asp.

While surveys do not have to be done annually, the latest available survey information should be reported in the AERR each year along with trend data (information on the same questions from surveys done in previous years), if available.

The Alberta Auditor General's Office has prepared a resource on conducting surveys for the Alberta public sector: *Client Satisfaction Surveys*, October 1998. This document is available on the internet http://www.oag.ab.ca. Click on "The Reading Room."

Two resources were prepared for the Ministry in 1995 to provide guidance to school jurisdictions and schools on conducting satisfaction surveys:

- Environics West, *Pilot Project Report:* This report compares two methods of conducting surveys of parents, teachers and students: telephone interviews and mailed, self-administered questionnaires. The report is available on the internet at http://www.learning.gov.ab.ca/educationsystem/satisfaction/PilotProjectReport.pdf.

- Environics West, *Interviewing Manual: Telephone Satisfaction Surveys.* This manual provides advice on selecting samples and conducting telephone surveys. It is available on the internet at http://www.learning.gov.ab.ca/educationsystem/satisfaction/Interviewing_Manual.pdf.